

The Holiday Readiness & Activation Playbook



A strategy guide for a
successful holiday season

by  **ORDERPORT**

Happy Holiday Planning!

The Season That Defines Success

For wineries, the holidays aren't just busy, they're defining. Up to 35% of annual DTC revenue happens between November and December. It's when planning, teamwork, and technology converge to shape your year's success.

This guide blends strategic forecasting with hands-on execution, so you can plan smarter, sell creatively, and deliver the kind of customer experience that keeps guests coming back well past the season.

"Start early, stay organized, and keep it joyful. Preparation turns the holiday rush into lasting growth."

— Lailand & Laura, OrderPort

Lailand & Laura



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Forecasting & Demand Planning

Turn Data Into Your Competitive Edge

Holiday readiness starts with data. Industry research shows DTC wine shipment volume can increase up to 25% in Q4. Understanding those patterns helps you plan confidently and profitably.

Best Practices for Q4 Forecasting:

- Review last year's sales by channel (tasting room, online, club, wholesale).
- Identify top-selling SKUs for gift packs or limited editions.
- Audit fulfillment timelines and vendor capacity.
- Forecast staff coverage for shipment peaks.
- Confirm packaging and supply lead times early.

OrderPort Advantage: Unified POS, club, and eCommerce data helps you forecast accurately, plan promotions, and spot bottlenecks before they occur.

Pro Tip: Every hour invested in planning now saves days of chaos in December.

MAXIMIZING CLUB REVENUE & LOYALTY

TRANSFORM MEMBERS INTO YOUR BIGGEST HOLIDAY ADVOCATES

WINE CLUBS GENERATE NEARLY 50% OF DTC REVENUE FOR MANY SMALL AND MID-SIZED WINERIES. DURING THE HOLIDAYS, YOUR CLUB BECOMES YOUR MOST VALUABLE MARKETING ENGINE.

TACTICS TO GROW CLUB REVENUE:

- Offer early access to holiday releases and bundles.
- Launch “Gift a Club Membership” campaigns.
- Automate reactivation emails for paused memberships.
- Create refer-a-friend promotions with gift incentives.



CREATIVE ACTIVATION IDEAS:

- Mail “Holiday Tasting Party Kits” with pairing notes and recipes.
- Add handwritten notes or virtual tastings for top-tier members.
- Promote limited-edition magnums or verticals as collector’s gifts.



ORDERPORT ADVANTAGE: BUILD PERSONALIZED CAMPAIGNS, AUTOMATE MEMBER TRACKING, AND DELIVER LOYALTY REWARDS WITHOUT MANUAL SPREADSHEETS.

PRO TIP: HIGHLIGHT YOUR CLUB AS “THE GIFT THAT KEEPS GIVING”
A PRESENT THAT TURNS INTO A RELATIONSHIP ALL YEAR LONG.

Scaling Support & Fulfillment

Smooth Operations, Happy Customers

Customer service volume spikes during Q4, often due to shipping questions or club updates. Streamlined support means fewer headaches and happier guests.

Support Readiness Checklist:

- Automate replies for common FAQs (order tracking, shipping deadlines).
- Train seasonal staff with tone guides and process sheets.
- Use ticket tagging to prioritize high-impact requests.
- Post ship-by dates everywhere: your catalog, website, emails, and tasting room signage.

OrderPort Advantage: Real-time shipping integration and customer history at a glance so your team can respond faster and serve better.

Pro Tip: Clear deadlines create urgency and build trust.

1

Order By Dates

- Thanksgiving: Order by Nov 14
 - Hanukkah: Order by Dec 10
 - Christmas: Order by Dec 16
 - New Year's Eve: Order by Dec 27
- (Adjust with your carrier deadlines and by shipping service (ground vs express))

2

Shipping Specials

- Flat-rate shipping on holiday sets
- Free shipping on 6+ bottles
- Complimentary local delivery (within X miles)
- "Beat the Rush" early-bird shipping discount

3

OrderPort Tips

- Build in buffer days for possible delays (weather, carrier, etc)
- Consider regional shipping dates
- Post ship-by dates everywhere, your catalog, website, emails, and tasting room.

Campaign Planning & Holiday Promotions

Your Holiday Timeline:

Early November: Announce pre-holiday perks to club members.

Mid-November: Launch digital catalog and referral offers.

Thanksgiving Week: Emphasize shipping cutoffs and gift sets.

December: Focus on e-gift cards and local pickup reminders.

Campaign Essentials:

Use email + SMS for layered outreach.

Align design and copy across all channels.

Test subject lines and track engagement in OrderPort reporting.

Create and maintain a Holiday Promotions Calendar

Pro Tip: Consistency multiplies conversions so use one cohesive message across email, social, and in-person channels.

Proven Strategies

01

Holiday Gift Sets

Pair your wines with seasonal packaging or curated themes to raise average order value.

Pro tip: Segment by preferences—bold reds, sparkling celebrations, or light & bright whites—to make gifting easy and irresistible.

02

Holiday Catalogs

Send a physical or digital holiday catalog to your top customers. A curated guide puts your wines front and center when buyers are making their gift lists.

03

Local Partnerships

Team up with local businesses to create unique, one-of-a-kind gift sets. Think artisan foods, handmade goods, or collaborative experiences like a Small Business Holiday Bazaar or co-hosted wreath making or cookie decorating classes.

04

Limited-Time Releases

Introduce small-batch wines or reserve bottles available only during the holidays. Exclusivity sparks excitement and encourages faster purchasing decisions.

05

In-Person Specials

Host tasting room exclusives to drive foot traffic and create urgency. Limited-time discounts, flight pairings, or gift-ready add-ons can turn visitors into loyal buyers.

Planning your Holiday Sales

Great holiday sales come from planning ahead. Focus on these five areas:

1

Inventory & Packaging

- Review last year's sales to forecast demand
- Stock up on best-sellers + giftable SKUs
- Order ribbons, boxes, tissue, carriers early.
- Consider any specialty boxes or gift boxes.

2

Timing & Promotions

- Plan around key dates (Thanksgiving, Hanukkah, Christmas, New Year's)
- Balance early-bird promos with last-minute pushes
- Keep campaigns focused, not overwhelming





Marketing Channels



Customer Experience



Staffing & Training



 **OrderPort Tip:** Keep the planning detailed and the customer experience simple.



Holiday Gift Ideas

Curated Gift Sets

- 2-6 bottle bundles with festive packaging
- Themes: Cozy Reds, Sparkling Celebrations, Winter Whites
- Add recipes or pairing notes for extra value

Magnum & Reserves

- Showstopper gifts that feel exclusive
- Perfect for holiday tables or collectors
- Limited supply creates urgency

Build Your Own Gifts

- Customers choose bottles + add-ons (chocolates, olive oil, glassware)
- “Add a gift box and leave a note and we’ll wrap it.”

Corporate Gifting

- Personalized notes, branded packaging, and direct shipping
- Position as a turnkey solution for businesses
- Offer virtual tastings with the winemaker

Gift Clubs

- 3-12 month clubs or subscription options
- A gift that keeps giving all year long
- Offer a mailed physical card or certificate to wrap

Holiday Tasting Party Kit

- Verticals, Varietal Comparisons, Tasting Line Up sold as a package.
- Add in tasting notes, paired recipes, and other educational materials.

Event Tickets

- Sell early access tickets to spring events
- Promote your trips abroad - cruises, etc.
- Private Party Dinner Packages - “Extend the holidays to Wine Country”



Holiday Sales Tool Kit

The right tools turn holiday planning into holiday profit. Think of this as your sales toolkit, everything you need to market smarter, sell easier, and give customers a polished, curated experience.



MARKETING PLATFORMS

- Email – Reach customers with campaigns, gift guides, and shipping reminders.
- Text (SMS) – Instant, direct updates, perfect for last-minute promotions, shipping deadlines, and reminders.

SALES PLATFORMS

- Phone Sales - Personal and effective
- eCommerce – Link promotions and catalog offers straight to your webstore.
- In-Person – Don't forget to promote in your tasting room! Displays are powerful!

DESIGN PLATFORMS

- Canva – Easy templates for catalogs, flyers, and gift sets, branded your way.
- Adobe/InDesign – Advanced design for wineries with an in house marketing team.

CATALOG PLATFORMS

- Issuu – Upload a PDF and turn it into a page-flipping digital catalog.
- Flipsnack – Interactive flipbook-style catalogs with clickable links.



OrderPort Tip: This toolkit works best when it's connected. Design in Canva, publish with Issuu, share via email and text, and link everything back to your eCommerce store, all while reinforcing it in person at your tasting room.



Holiday Catalogs

A holiday catalog isn't just a list of products, it's an interactive shopping experience. Done right, it keeps your customers focused on your wines and gifts in a curated, fun tool that makes buying effortless.

Why Catalogs Work

- Visibility: Keeps your winery front and center during the busiest season.
- Convenience: Shoppers explore curated packs, gift sets, and specials at their own pace.
- Inspiration: Bundles, pairings, and themed collections spark ideas buyers may not have considered.

Physical vs Digital

Physical Catalogs

- Perfect for top customers, club members, or high-value leads.
- Slip them into fall shipments or mail in early November.
- Add premium touches: foil accents, handwritten notes, luxury paper.

Digital Catalogs

- Instantly shareable and cost-effective.
- Distribute through email, website embeds, and social media.
- Use clickable links to take buyers directly to checkout.



OrderPort Tip: Pair a physical catalog for your VIPs with a digital version for everyone else. Together, they create excitement and drive action.





Gift Clubs: The Gift That Keeps on Giving

There's something magical about a gift that lasts beyond the holidays. That's what makes Gift Clubs so powerful. They transform a single present into a year of connection, joy, and anticipation.

Instead of one bottle under the tree, imagine your customers giving three months, six months, or even a full year of curated wine deliveries. Each shipment is a reminder of the season, a touchpoint with your winery, and a moment of delight for the recipient.

Gift Clubs are also wonderfully flexible. They can be simple or tailored from winemaker select to customer choice clubs.. The key is positioning them as more than wine, they're an experience, a memory, and a relationship extended over time.

You're Invited!

Holiday Events



The holidays are about more than gifts, they're about connection. Hosting an event during this season gives your customers a reason to gather, celebrate, and make your winery part of their traditions.

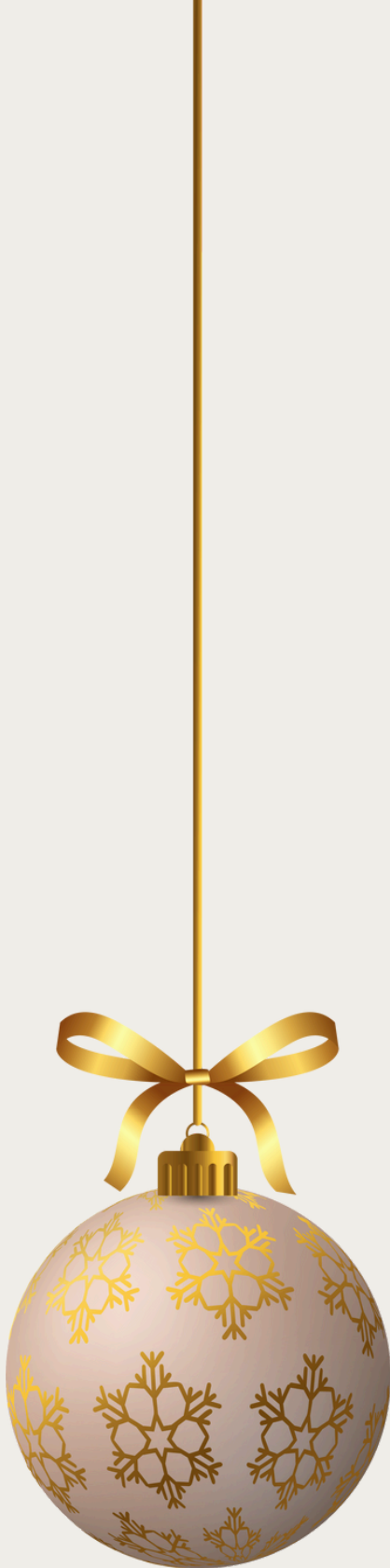


OrderPort Tips: Choose one or two anchor events that fit your winery's style, then use smaller experiences (like tastings or pop-ups) to keep momentum all season.

Offer gift wrapping in the tasting room so customers can buy wine and leave with it ready to give.

HOLIDAY EVENT IDEA VAULT

- ✓ Wreath Making Class
- ✓ Sip & Shop Bazaar
- ✓ Holiday Movie Night
- ✓ Cheeseboard/Pairing Class
- ✓ Cheers for Charity - Fundraiser
- ✓ Santa Paws - Bring your pup for pictures with Santa



Local Partnerships

Pair your wines with local chocolates, cheeses, or handmade crafts for one-of-a-kind holiday bundles.

Membership Extension

Extend your membership benefits to a neighboring winery's members for the holiday season for cross promotional marketing.

Creative Classes

Partner with florists, bakers, or chefs to co-host seasonal workshops like wreath-making, cookie decorating, or wine & cheese pairing nights.

Have Fun!

Invite your customers to watch your favorite christmas movie. Throw a pajama champagne brunch! Bring Santa in for photos with pups. Be authentic, be you, but don't forget to HAVE FUN!

Maximize Sales

Holiday sales are all about momentum. Smart promotions don't just move bottles; they spark excitement, build loyalty, and make your customers feel like insiders. Here are four strategies to make every campaign count



Little Tweaks, Big Payoff

Holiday promotions don't have to be complicated. A tiered discount here, a bundled add-on there — these small moves can raise order value and create momentum.

- Tiered discounts & add-on incentives
- Limited-time promos & early-access perks
- Wine bundles with seasonal add-ons

Keep It Simple, Keep It Selling

The easier you make it, the more they'll buy.

- Test subject lines, timing, and offers to see what clicks
- Keep promos clear, easy to redeem, and gift friendly
- Highlight convenience — “ready to ship” or “perfect for gifting”



Know Your People, Personalize Your Pitch



Your customers have already told you what they love, now use it.

- Tap into purchase history & club data to tailor promotions
- Example: “We saved a case of your favorite Syrah, this week only”
- Personalized offers outperform generic blasts every time

Be Everywhere at Once

Your customers live across channels — your promos should too.

- Use email, SMS, and social together for broader reach
- Reinforce urgency with the same message everywhere
- Consistency multiplies action (3x higher conversions)



OrderPort Tip: Layer these moves together — bundles for value, personalized offers for loyalty, and multi-channel campaigns for reach. That’s how wineries turn seasonal sales into record holiday revenue.

Don't Forget About *NEW YEAR'S EVE*

Keep the Celebration Going

Spotlight Sparkling Releases

- Countdown Campaigns: Launch a targeted push on your sparkling wines beginning the week after Christmas. Highlight them as “the must-have bottle for ringing in the New Year”.
- Limited-Time Celebration Bundles: Create packages like “New Year’s Eve Essentials” (sparkling + party snacks from a local artisan) or “Bubbles & Bright Whites” to fit different preferences.

“Toast Kits” That Sell

- Go beyond the bottle by creating grab-and-go kits that elevate the celebration:
- Sparkling Wine + Branded Flutes – A keepsake that also markets your winery year-round.
- Mini Party Packs – Sparkling, festive confetti, and tasting notes for pairings.
- Host Kits – A 6- or 12-bottle mixed sparkling case designed for party hosts.

OrderPort Tip: Use Multi-Channel Promotion

- Email & SMS Countdown: Schedule short, punchy reminders leading up to December 31st.
- Social Media Tie-Ins: Share “Ways to Toast” posts with food pairings and cocktail recipes featuring your sparkling wines.
- Catalog Inserts: Include a special “Ring in the New Year” section with toast kits and bundles.



Recipes & Brand Connection

Bring your winery to life with the flavors and traditions of the season. Share a family holiday recipe alongside the perfect wine pairing, add entertaining tips or tablescape inspiration, and include personal stories from your winemaker or team. These authentic touches deepen connection, give customers a reason to keep your catalog close at hand, and invite them into your winery family.



OrderPort Tip: Encourage customers to join the story. Invite them to share their own holiday recipes or photos with your wines for a chance to be featured.

Holiday Wine Sale Program Checklist

Everything a winery needs to plan, promote, and profit from the holiday season.

1. Pre-Sale Planning & Strategy

- Review last year's holiday sales performance (top SKUs, AOV, key dates)
- Forecast expected volume and identify primary goals (revenue, inventory reduction, club signups)
- Finalize holiday sale dates and durations (Black Friday, Cyber Monday, etc.)
- Select which wines/products will be promoted
- Define offer structure (tiered discounts, bundles, gift sets, shipping incentives)
- Allocate budget for marketing spend (ads, boosted posts, email tools)
- Create a promo code strategy (if needed)

2. Inventory & Fulfillment Readiness

- Audit current inventory and reorder top-performing wines early
- Confirm bottling or release dates for any new holiday SKUs
- Assemble pre-packed bundles or gift sets
- Review packaging supplies (tissue, boxes, cold packs, etc.)
- Verify shipper availability and holiday deadlines (UPS, FedEx, etc.)
- Establish a final ship date and communicate clearly across all channels
- Prepare tasting room or fulfillment staff with FAQ sheets

3. Ecommerce & POS Setup

- Schedule homepage banner and promotional product placement
- Activate/verify promo codes in POS and online store
- Add promotional products or gift sets to your ecommerce store
- Test cart experience: mobile, tablet, desktop
- Ensure all promotional details are listed clearly (discounts, shipping cutoff dates, limits)
- Enable order tracking and update automated confirmation/shipping emails

Holiday Wine Sale Program Checklist

4. Email Marketing Campaign

- Build segmented email lists (past gift buyers, club members, general subscribers)
- Schedule teaser email (1–2 weeks before sale)
- Create launch email with strong CTA and clear offer
- Schedule reminder email during mid-sale
- Schedule last-chance email 48 hours before end
- Schedule post-sale thank-you email
- Set up email resends to non-openers (24–48 hours after original send)

5. Social Media & Advertising

- Build content calendar (teasers, countdowns, product spotlights)
- Create visuals for all channels (Instagram, Facebook, stories, reels, ads)
- Plan boosted posts or paid campaigns targeting gift buyers and lookalike audiences
- Write social post copy and schedule posts ahead of time
- Encourage staff, influencers, and club members to share and tag your posts

6. In-Person & Club Member Coordination

- Train tasting room and phone support staff on sale details and shipping cutoffs
- Offer early access or exclusive bundles for wine club members
- Create club-only tasting room signage or holiday handouts
- Promote gift memberships and/or holiday add-on purchases during club pickups

7. Post-Sale Analysis & Follow-Up

- Review campaign results: open rates, sales conversions, best sellers
- Tag holiday buyers in CRM for future retargeting
- Send thank-you note to first-time customers
- Promote New Year or January offers as follow-up
- Use customer feedback or reviews in future promotions

A large, glowing Christmas tree stands in a snowy landscape under a dark sky. The tree is covered in warm white lights and snow. The text "Thank You!" is centered over the tree in a large, black, serif font with a white outline. Below it, the text "LET'S MAKE THIS YEAR AMAZING!" is centered in a smaller, white, serif font.

Thank You!

LET'S MAKE THIS YEAR
AMAZING!